02/017/27/basic

BASIC
SSA Pub. No. 68-0201727
June 1989

Audience:
DO/BO/TSC: CR, CR TII, DRT, DT, FR, OA, OS, RR, SR, TSC-SR;
OIO: BA, BIES, CA, CATA, CCRE, CDA, CTS, EIE, ERE, FCR, FDE, LC, PETE, RECONE, RECONR, RECOVR

Originating Office: OP, OIP

PROGRAM OPERATIONS MANUAL SYSTEM
Part 02 - General
Chapter 017 - Totalization Benefits
Subchapter 27 - Agreement with Portugal

New Material — No. of Pages

Table of Contents
(01727.001-01727.215).....1
GN 01727.020 A.-GN 01727.215 E.....9

ACTION NOTE

Table of Contents (GN 01701.000 - 01721.000)--Add "Agreement with Portugal....GN 01727.000"

Background

A totalization agreement with Portugal is effective August 1, 1989. This transmittal provides background information on the Portuguese social security system, explains the major provisions of the agreement, and provides instructions on how to take and process claims for both the U.S. and Portuguese social security benefits filed under the agreement.

This is an entirely new subchapter.

Key Words and Phrases Selected for Indexing

TOTALIZATION--PORTUGAL
alien nonpayment, GN 01727.140

D

U.S. Department of Health and Human Services
Social Security Administration
Office of Policy
SSA Pub. No. 68-0201727
I.C.N. 995691

Effective Date: August 1, 1989

Selective Distribution
L12/PSC
To adjust quantity requirements, submit form SSA-1296, "Request for Address or Distribution Change"

HE 3.6/5:
READEX best copy available

TOTALIZATION--PORTUGAL (CON'T)
appeals, GN 01727.150
application, GN 01727.215
computations
Portuguese totalization benefits, GN 01727.130
coverage
converting Portuguese to U.S., GN 01727.120B.
converting U.S. to Portuguese, GN 01727.125B.
defined, GN 01727.115
effective date, GN 01727.105
eligibility
Portuguese totalization, GN 01727.125
U.S. totalization, GN 01727.120
evidence requirements
Portuguese benefits, GN 01727.210
U.S. benefits, GN 01727.205
overview, GN 01727.001
Portuguese system
background, GN 01727.015
contributions, GN 01727.015
coverage, GN 01727.015
types of benefits, GN 01727.020
purpose of agreement, GN 01727.110
residence requirements
U.S. benefits, GN 01727.145
scope of agreement, GN 01727.112
SSA-2490-F4, completion, GN 01727.215
voluntary contributions, GN 01727.135

These additions may be penciled in on the Comprehensive Index.

POMS

PROGRAM OPERATIONS MANUAL SYSTEM

Part 02

General

CHAPTER 017

Totalization Benefits

SUBCHAPTER 27

Agreement With Portugal

U.S. Department of
Health and Human Services
Social Security Administration
Office of Policy
SSA Pub. No. 68-0201727
I.C.N. 995691

Check List of POMS Transmittals Received

TN	Date	Initial	TN	Date	Initial	TN	Date	Initial	TN	Date	Initial
1.			37.			73.			109.		
2.			38.			74.			110.		
3.			39.			75.			111.		
4.			40.			76.			112.		
5.			41.			77.			113.		
6.			42.			78.			114.		
7.			43.			79.			115.		
8.			44.			80.			116.		
9.			45.			81.			117.		
10.			46.			82.			118.		
11.			47.			83.			119.		
12.			48.			84.			120.		
13.			49.			85.			121.		
14.			50.			86.			122.		
15.			51.			87.			123.		
16.			52.			88.			124.		
17.			53.			89.			125.		
18.			54.			90.			126.		
19.			55.			91.			127.		
20.			56.			92.			128.		
21.			57.			93.			129.		
22.			58.			94.			130.		
23.			59.			95.			131.		
24.			60.			96.			132.		
25.			61.			97.			133.		
26.			62.			98.			134.		
27.			63.			99.			135.		
28.			64.			100.			136.		
29.			65.			101.			137.		
30.			66.			102.			138.		
31.			67.			103.			139.		
32.			68.			104.			140.		
33.			69.			105.			141.		
34.			70.			106.			142.		
35.			71.			107.			143.		
36.			72.			108.			144.		

Check List of POMS Transmittals Received

TN	Date	Initial	TN	Date	Initial	TN	Date	Initial	TN	Date	Initial
145.			181.			217.			253.		
146.			182.			218.			254.		
147.			183.			219.			255.		
148.			184.			220.			256.		
149.			185.			221.			257.		
150.			186.			222.			258.		
151.			187.			223.			259.		
152.			188.			224.			260.		
153.			189.			225.			261.		
154.			190.			226.			262.		
155.			191.			227.			263.		
156.			192.			228.			264.		
157.			193.			229.			265.		
158.			194.			230.			266.		
159.			195.			231.			267.		
160.			196.			232.			268.		
161.			197.			233.			269.		
162.			198.			234.			270.		
163.			199.			235.			271.		
164.			200.			236.			272.		
165.			201.			237.			273.		
166.			202.			238.			274.		
167.			203.			239.			275.		
168.			204.			240.			276.		
169.			205.			241.			277.		
170.			206.			242.			278.		
171.			207.			243.			279.		
172.			208.			244.			280.		
173.			209.			245.			281.		
174.			210.			246.			282.		
175.			211.			247.			283.		
176.			212.			248.			284.		
177.			213.			249.			285.		
178.			214.			250.			286.		
179.			215.			251.			287.		
180.			216.			252.			288.		

01727.000 Agreement with Portugal

	Section
Overview of Agreement with Portugal	01727.001

Portuguese Social Security System

Coverage and Contributions Under the Portuguese System	01727.015
Portuguese Social Security Benefits	01727.020

Provisions of the Portuguese Agreement

Effective Date of Agreement	01727.105
Purpose of Agreement	01727.110
Scope of Agreement	01727.112
Definition of Portuguese Territory	01727.115
Eligibility for U.S. Totalization Benefits	01727.120
Eligibility for Portuguese Totalization Benefits	01727.125
Portuguese Totalization Benefits—Policy Principles	01727.130
Voluntary Contributions to the Portuguese System	01727.135
Alien Nonpayment Provision	01727.140
U.S. Residency Requirements for Alien Dependents and Survivors	01727.145
Filing Appeals of Decisions on U.S. or Portuguese Claims	01727.150

Evidence and Application Requirements

Evidence Required for U.S. Totalization Benefits—Operating Policy	01727.205
Developing Evidence in Claims for Portuguese Benefits	01727.210
Application for Benefits Under the Portuguese Agreement	01727.215

Agreement with Portugal

01727.001 Overview of Agreement with Portugal

A. Introduction

The United States and Portugal have entered into a social security agreement to improve protection for people who work or have worked in both countries.

B. Background

The agreement with Portugal is similar to the agreements the United States has with other countries. Claims-taking procedures which are common to all agreements are contained in subchapters GN 01701 and GN 01702. The following sections provide instructions which pertain specifically to the Portuguese agreement. In particular, they:

- give a brief overview of the Portuguese system,
- explain the provisions of the agreement, and
- provide instructions on how to take and process claims for both U.S. and Portuguese benefits filed under the agreement.

Portuguese Social Security System

01727.015 Coverage and Contributions Under the Portuguese System

A. Background

Almost all workers in Portugal are covered under either the general social security system (Regime Geral de Previdencia) or under one of several special systems.

B. Description of Portuguese Social Security Coverage and Contributions

1. **COVERAGE**

- The **general social security system** covers most wage and salaried workers.
- **Several special systems** cover workers in specific occupational categories, including rural workers, the self-emloyed, domestic servants, members of the clergy, civil servants, and bank employees. The special systems generally provide the same types of benefits as the general system.

2. **COMPULSORY CONTRIBUTIONS**

- Under the **general social security system**, employees and employers contribute a fixed percentage of the employee's salary, currently 11 percent for employees and 24.5 percent for employers.
- The contributions to the general system finance OASDI, workers' compensation, unemployment benefits, health insurance, short-term cash sickness and maternity benefits, and family allowances.
- Self-employed persons contribute 15 percent of earnings up to a monthly ceiling equal to eight times the national minimum wage.

3. **VOLUNTARY CONTRIBUTIONS**

Persons who are not subject to compulsory contributions and who meet certain qualifying conditions may make voluntary social security contributions to build future benefit rights.

C. Reference

Voluntary Contributions, GN 01727.135

01727.020 Portuguese Social Security Benefits

A. Introduction

Portuguese social security provides a wide range of benefits, including:

- old-age
- survivors, and

A. Introduction (Cont.)

- disability benefits

To qualify for Portuguese benefits, a worker must meet certain eligibility requirements including a minimum length of coverage.

B. Description of Portuguese Benefits

This chart describes the eligibility requirements for Portuguese old-age, survivors, and disability benefits under the **general system**, and how such benefits are computed. (See GN 01727.125 for an explanation of how the Portuguese agreement permits persons who have worked in both the United States and Portugal to qualify for these benefits based on totalized, i.e., combined, work credits).

Type of benefit	*Eligibility requirements*	*Benefit amount*
old-age pension (worker)	• age 65 for men • age 62 for women • age 70 if working • at least 120 months of contributions	• pension=sum of earnings-related pension + flat-rate increment • earnings-related pension=2.2% of average monthly earnings in highest 5 years out of last 10 years before retirement times number of years of coverage • full earnings-related pension=80% of average monthly earnings; minimum pension=30% • 13 payments yearly • pension may be increased by spouse's supplement • supplement may be paid if the worker requires constant care of a third person
survivors pension	deceased worker must have had at least 36 months of contributions	supplement may be paid if survivor requires constant care of a third person
• widow	• married for at least one year (unless death was accidental or there are dependent children) • no age requirement • if under age 35, benefits paid for only 5 years (unless widow is disabled or has dependent children)	60 percent of pension worker was receiving or could have received at death
• surviving divorced wife	same as surviving wife; in addition, must have been entitled to court-ordered alimony at time of worker's death	
• widower	• married for at least one year (unless death was accidental or there are dependent children) • must be totally and permanently disabled or age 65 at wife's death	
• surviving children	eligible up to age 18 (or 24 if student); no age limit if disabled	20 percent of deceased's benefit for one child, 30 percent for two and 40 percent for three or more; double if both parents deceased
• other dependent relatives	must be currently eligible to receive a family allowance and no surviving spouse or child beneficiary	30 percent of deceased's benefit for one, 50 percent if two, 70 percent if three and 80 percent if four or more
lump-sum grants • funeral grant	deceased must have been pensioner or covered under system at time of death	set amount for burial

B. Description of Portuguese Benefits (Cont.)

Type of benefit	*Eligibility requirements*	*Benefit amount*
• survivors grant	• deceased must have had at least 6 months of coverage, including at least 3 months of contributions • payable to surviving spouse if no other dependent survivors; otherwise, 50 percent to spouse and 50 percent split among other survivors	6 times average monthly earnings during worker's 2 highest paid years out of the last 10
disability (worker)	• permanently unable to earn more than 1/3 of previous earnings • 60 months of contributions • under age 65 for men • under age 62 for women • no recency-of-coverage requirement	same as for old-age pension

C. Operating Procedures—Request for Information

Refer individuals who want official information about Portuguese benefits to:

Departamento de Relacoes
Internacionais e Convencoes
de Seguranca Social
Rua da Junqueira, 112
1302 Lisboa Codex
Portugal

Provisions of the Portuguese Agreement

01727.105 Effective Date of Agreement

A. Policy Principle

The agreement with Portugal is effective August 1, 1989.

B. Operating Policy

Periods of U.S. and Portuguese social security coverage a worker earned prior to August 1, 1989, may be used to establish entitlement to U.S. or Portuguese totalization benefits, but the earliest possible month of entitlement to such benefits is August 1, 1989.

01727.110 Purpose of Agreement

A. Policy Principle

The social security agreement between the United States and Portugal has two main purposes:

1. ELIMINATING DUAL COVERAGE

The agreement eliminates dual social security coverage and taxation, the situation that occurs when a person from one country works in the other country and is required (along with the person's employer) to pay social security taxes to both the United States and Portugal for the same work.

2. COMBINING COVERAGE TO DETERMINE ELIGIBILITY

The agreement helps eliminate situations where workers suffer a loss of benefit rights because they have divided their careers between the two countries. Under the agreement, workers may qualify for partial U.S. or Portuguese benefits, called totalization benefits, based on combined work credits from both countries. As indicated in the chart below, the totalization provisions of the agreement apply to old-age, survivors, and disability benefits but not to other types of benefits.

B. Reference

Coverage provisions of the Portuguese agreement, RS 02001.550 - RS 02001.581

01727.112 Scope of Agreement

A. Policy Principle—Included in Agreement for U.S.

- Social Security taxes including the Medicare portion
- retirement, survivors and disability benefits, (but not special age-72 benefits, Medicare benefits or the Supplemental Security Income program)

B. Policy Principle—Included in Agreement for Portugal

- taxes covering not only old-age, survivors and long-term disability benefits, but also sickness, maternity, workers' compensation, unemployment, health insurance and family allowance benefits
- old-age, survivors and long-term disability benefits (but not other benefits mentioned above)

01727.115 Definition of Portuguese Territory

A. Introduction

As explained in GN 01727.140 and 01727.145, certain provisions of the agreement apply only to persons who reside in Portugal.

B. Definition

The agreement defines Portuguese territory as:

- Portuguese territory on the European Continent
- the Azores and Madeira archipelagos

01727.120 Eligibility for U.S. Totalization Benefits

A. Introduction

Under the agreement, if an NH has **at least** 6 quarters of U.S. coverage **but not enough to be insured** for regular U.S. benefits, the NH's coverage credits under the Portuguese social security system can be added to his or her U.S. coverage to permit the NH (or any dependents or survivors) to qualify for U.S. totalization benefits.

B. Process Description

STEP	*ACTION*
1	determine that NH has at least 6 U.S. quarters of coverage and is not already insured for regular U.S. benefits.
2	credit one U.S. quarter of coverage for every three months of Portuguese coverage in a calendar year (Portuguese coverage is measured in terms of months), but • do not credit months in a calendar quarter that is already credited as a U.S. quarter of coverage • do not credit more than 4 quarters of coverage for any calendar year
3	add U.S. and Portuguese coverage to determine if insured status is met based on combined coverage • if yes, go to step 4 • if no, deny claim
4	compute U.S. totalization benefit (see GN 01701.146)

C. Related Policy

The Office of International Operations (OIO) is responsible for

- converting Portuguese coverage to U.S. QC's, and
- adjudicating claims for U.S. totalization benefits when the worker has at least 6 QC's but is not insured based on U.S. coverage alone.

01727.125 Eligibility for Portuguese Totalization Benefits

A. Introduction

Under the agreement, Portugal will count a worker's U.S. social security coverage, when necessary, in determining eligibility for Portuguese social security benefits.

B. Process Description

Step	*The Portuguese social security agency must*
1	determine that worker has at least one year of Portuguese coverage and is not already insured for regular Portuguese benefits
2	credit each U.S. quarter of coverage as 3 months of Portuguese coverage (Portuguese coverage is credited in terms of months) unless Portuguese months of coverage already credited for that period
3	add Portuguese and U.S. coverage to determine if eligibility requirements are met based on combined coverage (See GN 01727.020 for an explanation of the basic eligibility requirements for Portuguese benefits)
4	compute Portuguese totalization benefit

NOTE: In some cases, the benefits provided under the Portuguese **special social security systems** for specific occupational categories are more favorable than those under the **general system**. Portugal will take into account U.S. periods of coverage to meet the eligibility requirements for these special system benefits, but only if they were completed in an occupation or profession similar to that covered by the special system.

01727.130 Portuguese Totalization Benefits—Policy Principles

When entitlement to Portuguese old-age, survivors, or disability benefits is established based on combined U.S. and Portuguese coverage, the amount of the totalization benefit payable will be computed using the formula described in GN 1727.020 B, based only on the worker's periods of coverage and earnings credited under Portuguese law. The worker's U.S. coverage and earnings are not taken into account for computation purposes.

If a Portuguese resident qualifies for a totalization benefit from Portugal, as well as a U.S. benefit, and the amount of the combined benefits would be less than the minimum benefit payable under Portuguese law, Portugal will pay a supplement sufficient to raise the combined benefits to the minimum benefit amount.

01727.135 Voluntary Contributions to the Portuguese System

A. Background

Under Portuguese law, Portuguese nationals who are not compulsorily covered by Portuguese social security may, under certain circumstances, elect to make voluntary contributions. In some cases, prior Portuguese coverage is needed to be eligible to make voluntary contributions.

B. Policy Principles

- The agreement gives U.S. nationals who reside in Portugal the right to make voluntary contributions to the Portuguese system on the same basis as Portuguese nationals.
- The agreement permits both U.S. and Portuguese nationals to have their prior U.S. coverage counted, if necessary, to establish the right to make voluntary contributions.

NOTE: U.S. nationals who reside outside of Portugal (e.g., in the United States) are not eligible to make voluntary contributions to the Portuguese system.

C. Operating Procedure

SITUATION	*ACTION*
general inquiry about voluntary contributions	direct the person to the Departamento de Relacoes Internacionais e Convencoes de Seguranca Social at the address in GN 01727.020
individual needs U.S. coverage record to qualify for voluntary contributions	instruct the person to obtain a coverage record by completing SSA-7004 (requesting QC breakdown)

01727.140 Alien Nonpayment Provision

A. Introduction

The agreement with Portugal liberalizes the rules under which U.S. Social Security benefits may be paid to aliens residing in Portugal.

B. Policy Principles

- Under the agreement, alien beneficiaries who would otherwise be subject to suspension under the alien nonpayment provisions of section 202(t) of the Social Security Act are exempt from suspension for any periods in which they reside in Portugal beginning August 1, 1989.
- This exemption applies to people who receive regular RSDI benefits as well as totalization benefits.

C. Example

An Albanian national residing in Portugal is entitled to RIB, which may be paid for months beginning August 1, 1989, as long as he resides in Portugal. (Before the agreement, the benefit would have been suspended.)

D. Operating Procedure

If a claimant who does not meet another exception to the alien nonpayment provisions alleges residence in Portugal, develop his or her residence status to verify that the exemption provided by the agreement applies.

E. References

Alien nonpayment provisions, RS 02610.00ff

Definition of Portuguese territory, GN 01727.115

Developing residence status, GN 01702.105

01727.145 U.S. Residency Requirements for Alien Dependents and Survivors

A. Introduction

Beginning in 1985, Section 202(t) of the Social Security Act restricts the payment of benefits to alien dependents and survivors outside the United States. Totalization agreements provide an exception to these restrictions.

B. Policy Principle

Benefits generally may not be paid to aliens who first became eligible for dependents and survivors benefits after 1984, unless they satisfy certain U.S. residency requirements.

EXCEPTION: Citizens or residents of a country with which the U.S. has a totalization agreement are exempt from these requirements. Therefore, residents of Portugal or Portuguese nationals regardless of where they reside are exempt from these requirements as of August 1, 1989.

C. Operating Procedure

If an alien dependent or survivor who does not meet the U.S. residency requirement alleges he is a citizen or resident of Portugal, develop citizenship or residency status.

D. References

Definition of Portuguese territory, GN 01727.115

Developing citizenship and residence status, GN 01702.105 C., GN 01702.105 D.

Residency requirements for alien dependents and survivors, RS 02610.025

01727.150 Filing Appeals of Decisions on U.S. or Portuguese Claims

A. Policy Principle

The agreement provides that persons who wish to appeal a decision on a claim for U.S. or Portuguese benefits may file the appeal with either country.

B. Reference

Appeals of foreign claims, GN 01701.300

Evidence and Application Requirements

01727.205 Evidence Required for U.S. Totalization Benefits—Operating Policy

When a person files only for U.S. totalization benefits under the agreement with Portugal, the applicant must submit the same evidence that would be necessary to establish a claim for regular RSDI (nontotalization) benefits. In addition, obtain the evidence in GN 01702.105 whenever totalization benefits are being claimed from the U.S.

01727.210 Developing Evidence in Claims for Portuguese Benefits

A. Introduction

Under the agreement with Portugal, SSA will take applications for both regular and totalization benefits on behalf of Portugal and provide limited assistance in obtaining evidence needed to support the claim for Portuguese benefits.

B. Policy Principle—Factors of Entitlement

Type of benefit	*Factor to be Established*
Old Age	• age of worker • date of marriage, if spouse's supplement claimed • type of covered work in U.S. (if benefits claimed under one of the occupational systems—see GN 01727.015) • degree of impairment if constant attendance supplement claimed
Survivors	• age of claimant • date of marriage (if spouse applying) • date of divorce, if applicable • type of covered work in the U.S. (if benefits claimed under one of the occupational systems—see GN 01727.015) • degree of impairment if constant attendance supplement claimed
Disability	• age of worker • degree and cause of impairment • type of covered work in the U.S. (if benefits claimed under one of the occupational systems—see GN 01727.015)

C. Policy Principle—Using Evidence

As a general rule, evidence which is used to establish a factor of entitlement for U.S. Social Security benefits may also be used by Portugal to establish the same factor for Portuguese benefits.

D. Operating Procedure

1. GENERAL

Accept any evidence the applicant wishes to submit. It is unnecessary for the applicant to submit additional evidence to document a factor of entitlement for Portuguese benefits when that factor has already been verified for SSA purposes. If the applicant requests guidance on the types of evidence to submit, refer to the guidelines in GN 00302.000ff for proof of age, GN 00304.000ff for proof of death, and GN 00305.000ff for proof of marriage.

CAUTION: Do not hold claims for Portuguese benefits for prolonged periods pending receipt of evidence. If an applicant is unable to obtain needed evidence within a reasonable period, transmit the claim to OIO without the evidence. Advise the applicant that the responsible Portuguese agency will contact him directly to obtain any evidence they need.

2. ALL CLAIMS

Take the following actions when developing evidence (except for medical evidence) to support a claim for Portuguese benefits.

D. Operating Procedure (Cont.)

2. ALL CLAIMS (Cont.)

Action	*Special Instruction*
Accept any evidence the applicant wishes to submit	• The applicant need not submit additional evidence for any factor of entitlement already established for SSA purposes. • Applicants filing for benefits from one of the special occupational systems in Portugal will need to establish the type of work the NH performed in the United States. If the applicant asks for guidance, suggest that he obtain a statement from the NH's employer showing the type of occupation and the dates of employment in that occupation. • If the applicant does not want to release an original document, photocopy and certify.
Document the file to show when an eligibility factor relevant to the Portuguese claim has already been verified for a U.S. claim.	
• concurrent title II claim	• If U.S. claim sent to other than OIO, photocopy evidence and send to OIO with Portuguese claim.
• prior title II claim	• Include MBR printout in claims file sent to OIO to show which factors, other than disability, have been verified in a prior claim.
Obtain record of NH's U.S. coverage in all claims for Portuguese benefits	• enter TB FAC code and PORTU on CAPS input to produce coverage record for Portuguese claim. • evidence of lag wages is not needed for Portuguese claims.

3. DISABILITY CLAIMS

In addition to taking the actions in 2. above, take the following actions when developing medical evidence for Portuguese disability claims.

Situation	*Action*
Claim for Portuguese benefits only	Advise the applicant that medical evidence must be submitted to support the claim. Do not attempt to secure evidence for the claimant or offer advice as to what types of evidence are needed by Portugal. • If medical evidence is submitted, send it to OIO at the address in GN 01702.030 along with the claims file. • If medical evidence is not submitted, transmit the file without it. Advise the claimant that the Portuguese agency will contact him or her directly, if necessary to obtain needed evidence.
Claim for Portuguese benefits and concurrent title II claim	Follow instructions in GN 01702.030 - GN 01702.215.

4. CLAIM FOR CONSTANT ATTENDANCE SUPPLEMENT

Under the Portuguese system, OASDI beneficiaries who are severely disabled and require the constant care of a third party may receive a supplement. If the applicant alleges such a disability, indicate in the remarks section of the SSA-2490-F4 the severity of the impairment and why it requires third party assistance. This will allow Portugal to solicit an application for a constant attendance supplement at the same time they request the other applications.

E. References

CAPS input requirements, SM 00320.493

Photocopying evidence, GN 00301.078

Special occupational systems, GN 01727.015

01727.215 Application for Benefits Under the Portuguese Agreement

A. Introduction

Form SSA-2490-F4 (Application for Benefits under a U.S. International Social Security Agreement) is used to apply for benefits under the agreement with Portugal. This is true whether the applicant is filing for benefits only from the United States, only from Portugal, or from both countries.

B. Operating Procedure

Benefit Claimed	*Action*
U.S. totalization benefits only	• Complete part I of SSA-2490-F4. • Complete appropriate RSDI application(s) (e.g., an SSA-1-F6 for retirement benefits).
Portuguese regular or totalization only	Complete parts I and II of SSA-2490-F4.
Portuguese benefits (regular or totalization) and U.S. totalization	• Complete parts I and II of SSA-2490-F4. • Complete appropriate RSDI application (e.g. an SSA-1-F6 for retirement benefits).

C. Operating Policy

After receiving a claim for Portuguese benefits that was filed with SSA, the Portuguese agency will ordinarily request the claimant to complete additional forms (e.g., the regular Portuguese benefit application) and/or submit additional evidence. The Portuguese will contact the claimant directly, usually by mail, to obtain any needed documentation.

D. Documentation

When completing the SSA-2490-F4, note these two documentation requirements.

1. **WORKER'S NAME**

Advise the Portuguese authorities of the worker's complete name. If the worker is Portuguese, the name usually will be very long and will be shown on an official Portuguese document such as a passport or identity card. In the event the name will not fit in item 3(a) of the SSA-2490-F4, use the "Remarks" section.

2. **CAUSE OF DISABILITY**

If an applicant is filing for Portuguese disability benefits, Portugal needs to know if an occupational injury caused the disability so it can determine if the claim should be paid under workers' compensation rather than the disability program. Therefore, indicate in the remarks section of the SSA-2490-F4 whether or not the claimant's disability resulted from a job-related injury.

E. References

Completing form SSA-2490-F4, GN 01701.350

Developing evidence in claims for Portuguese benefits, GN 01727.210

Forwarding foreign application to OIO, GN 01702.030

*U.S. GOVERNMENT PRINTING OFFICE:1989-241-323:00102